

# STATEMENT OF ECONOMIC INTERESTS

Form current as of 07/01/2014

NAME <b>Henry E "Hal" Cardwell</b>		Candidate for Election to this office? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
OFFICE OR POSITION HELD OR SOUGHT <b>School Board Member 7037392955</b>			
AGENCY/BUSINESS NAME <b>Alexandria City Public School</b>		PHONE	
AGENCY/BUSINESS ADDRESS			
CITY <b>Alexandria</b>	STATE <b>VA</b>	ZIP <b>22301</b>	
NAMES OF MEMBERS OF IMMEDIATE FAMILY <b>Devin Reese, Owen Cardwell, Camila Cardwell, Guy Cardwell</b>			

COMPLETE ITEMS 1 THROUGH 10. REFER TO SCHEDULES ONLY IF DIRECTED.  
Return Schedules only if needed to complete Statement.

You may attach additional explanatory information.

- Offices and Directorships.  
Are you or a member of your immediate family a paid officer or paid director of a business?

☐ YES ☒ NO

**If yes, complete Schedule A**
- Personal Liabilities.  
Do you or a member of your immediate family owe more than \$5,000 to any one creditor including contingent liabilities? (Exclude debts to any government and loans secured by recorded liens on property at least equal in value to the loan.)

☐ YES ☒ NO

**If yes, complete Schedule B**
- Securities.  
Do you or a member of your immediate family, directly or indirectly, separately or together, own securities valued in excess of \$5,000 invested in one business? Account for mutual funds, limited partnerships and trusts.

☒ YES ☐ NO

**If yes, complete Schedule C**
- Payment for Talks, Meetings, and Publications.  
During the past six months did you receive in your capacity as an officer or employee of your agency lodging, transportation, money, or anything else of value with a combined value exceeding \$200 (i) for a single talk, meeting, or published work or (ii) for a meeting, conference, or event where your attendance at the meeting, conference, or event was designed to (a) educate you on issues relevant to your duties as an officer or employee of your agency or (b) enhance your knowledge and skills relative to your duties as an officer or employee of your agency?

☐ YES ☒ NO

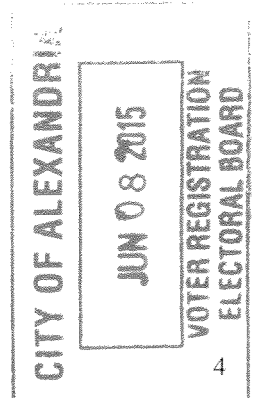
**If yes, complete Schedule D**
- Gifts.  
During the past six months did a business, government, or individual other than a relative or personal friend (i) furnish you or a member of your immediate family with any gift or entertainment at a single event, and the value received exceeded \$50 or (ii) furnish you or a member of your immediate family with gifts or entertainment in any combination and the total value received exceeded \$100, and for which you or the member of your immediate family neither paid nor rendered services in exchange? Account for entertainment events only if the average value per person attending the event exceeded \$50. Account for all business entertainment (except if related to the private profession or occupation of you or the member of your immediate family who received such business entertainment) even if unrelated to your official duties.

☐ YES ☒ NO

**If yes, complete Schedule E**
- Salary and Wages.  
List each employer that pays you or a member of your immediate family salary or wages in excess of \$5,000 annually. (Exclude state or local government or advisory agencies.) If no reportable salary or wages, check here ☐

**U.S. Army Corps of Engineers**

**Smithsonian Natural History Museum**



7. Business Interests.  
Do you or a member of your immediate family, separately or together, operate your own business, or own or control an interest in excess of \$5,000 in a business? ☒ YES ☐ NO  
**If yes, complete Schedule F**
8. Payments for Representation and Other Services.
- 8A. Did you represent, excluding activity defined as lobbying in § 2.2-419, any businesses before any state governmental agencies, excluding courts or judges, for which you received total compensation during the past six months in excess of \$1,000, excluding compensation for other services to such businesses and representation consisting solely of the filing of mandatory papers and subsequent representation regarding the mandatory papers? (Officers and employees of local governmental and advisory agencies do NOT need to answer this question or complete Schedule G-1.) ☐ YES ☒ NO  
**If yes, complete Schedule G-1**
- 8B. Subject to the same exceptions as in 8A, did persons with whom you have a close financial association (partners, associates or others) represent, excluding activity defined as lobbying in § 2.2-419, any businesses before any state governmental agency for which total compensation was received during the past six months in excess of \$1,000? (Officers and employees of local governmental and advisory agencies do NOT need to answer this question or complete Schedule G-2.) ☐ YES ☒ NO  
**If yes, complete Schedule G-2**
- 8C. Did you or persons with whom you have a close financial association furnish services to businesses operating in Virginia pursuant to an agreement between you and such businesses, or between persons with whom you have a close financial association and such businesses for which total compensation in excess of \$1,000 was received during the past six months? Services reported under this provision shall not include services involving the representation of businesses that are reported under item 8A or 8B. ☐ YES ☒ NO  
**If yes, complete Schedule G-3**
9. Real Estate.
- 9A. State Officers and Employees.  
Do you or a member of your immediate family hold an interest, including a partnership interest, valued at more than \$5,000 or more in real property (other than your principal residence) for which you have not already listed the full address on Schedule F? Account for real estate held in trust. ☐ YES ☐ NO  
**If yes, complete Schedule H-1**
- 9B. Local Officers and Employees.  
Do you or a member of your immediate family hold an interest, including a partnership interest, or option, easement, or land contract, valued at more than \$5,000 in real property (other than your principal residence) for which you have not already listed in the full address on Schedule F? Account for real estate held in trust. ☐ YES ☒ NO  
**If yes, complete Schedule H-2**
10. Real Estate Contracts with Governmental Agencies  
Do you or a member of your immediate family hold an interest valued at more than \$5,000 in real estate, including a corporate, partnership, or trust interest, option, easement, or land contract, which real estate is the subject of a contract, whether pending or completed within the past six months, with a governmental agency? If the real estate contract provides for the leasing of the property to a governmental agency, do you or a member of your immediate family hold an interest in the real estate valued at more than \$1,000? Account for all such contracts whether or not your interest is reported in Schedule F, H-1, or H-2. This requirement to disclose an interest in a lease does not apply to an interest derived through an ownership interest in a business unless the ownership exceeds three percent of the total equity of the business. ☐ YES ☐ NO  
**If yes, complete Schedule I**

Statements of Economic Interests are open for public inspection.

### **AFFIRMATION BY ALL FILERS.**

I swear or affirm that the foregoing information is full, true and correct to the best of my knowledge.

  
SIGNATURE OF FILER

8 Jun 15  
DATE

**SCHEDULE C****SECURITIES**NAME: Henry E "Hal" CardwellOFFICE OR POSITION HELD OR SOUGHT: School Board

**"SECURITIES"** INCLUDES stocks, bonds, mutual funds, limited partnerships, and commodity futures contracts. **"SECURITIES"** EXCLUDES certificates of deposit, money market funds, annuity contracts, and insurance policies.

Identify each business or Virginia governmental entity in which you or a member of your immediate family, directly or indirectly, separately or together, own securities valued in excess of \$5,000. Name each issuer and type of security individually.

Do not list U.S. Bonds or other government securities not issued by the Commonwealth of Virginia or its authorities, agencies, or local governments. Do not list organizations that do not do business in this Commonwealth, but most major businesses conduct business in Virginia. Account for securities held in trust.

If no reportable securities, check here \_\_\_\_.

NAME OF ISSUER	TYPE OF SECURITY (STOCKS, BONDS, MUTUAL FUNDS, ETC.)	CHECK ONE		
		5,001 to 50,000	50,001 to 250,000	More than 250,000
Amazon.com	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aqua America	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bristol Myers Squibb	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cisco	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chorox	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Electric	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IBM	stock	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Johnson & Johnson	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Southern Co	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AXA	margin account	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lord Abbot-short duration	mutual funds	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lord Abbot-total return	mutual fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Putnam Global Health	mutual fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Van Eck Investors Gold	mutual fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**SCHEDULE C** continued**SECURITIES**

NAME: Henry E "Hal" Cardwell

OFFICE OR POSITION HELD OR SOUGHT: School Board A ~~Card~~

**"SECURITIES"** INCLUDES stocks, bonds, mutual funds, limited partnerships, and commodity futures contracts.

**"SECURITIES"** EXCLUDES certificates of deposit, money market funds, annuity contracts, and insurance policies.

Identify each business or Virginia governmental entity in which you or a member of your immediate family, directly or indirectly, separately or together, own securities valued in excess of \$5,000. Name each issuer and type of security individually.

Do not list U.S. Bonds or other government securities not issued by the Commonwealth of Virginia or its authorities, agencies, or local governments. Do not list organizations that do not do business in this Commonwealth, but most major businesses conduct business in Virginia. Account for securities held in trust.

If no reportable securities, check here \_\_\_\_.

NAME OF ISSUER	TYPE OF SECURITY (STOCKS, BONDS, MUTUAL FUNDS, ETC.)	CHECK ONE		
		5,001 to 50,000	50,001 to 250,000	More than 250,000
VA CollegeAmerica Mutual 529	mutual funds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VA CollegeAmerica Intm Bel	mutual funds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VA " " New World 529	mutual funds	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VA " " Cap World	mutual funds	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barclay's Bank	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost Co	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hershey Co	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kimberly Clark	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lesgett & Platt	stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**SCHEDULE F****BUSINESS INTERESTS**

NAME:

Henry E. "Hal" Cardwell

OFFICE OR POSITION HELD OR SOUGHT:

School Board A

Complete this Schedule for each self-owned or family-owned business (including rental property, a farm, or consulting work), partnership, or corporation in which you or a member of your immediate family, separately or together, own an interest having a value in excess of \$5,000.

If the enterprise is owned or operated under a trade, partnership, or corporate name, list that name; otherwise, merely explain the nature of the enterprise. If rental property is owned or operated under a trade, partnership, or corporate name, list the name only; otherwise give the address of each property. Account for business interests held in trust.

NAME OF BUSINESS, CORPORATION, PARTNERSHIP, FARM; ADDRESS OF RENTAL PROPERTY	CITY OR COUNTY AND STATE	NATURE OF ENTERPRISE (FARMING, LAW, RENTAL PROPERTY, ETC.)	GROSS INCOME		
			50,000 or less	50,001 to 250,000	More than 250,000
Deer Creek Meadows LLC	Nevada city CA	Land subdivision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>